

Mass Upload Process Overview

Agencies can load large volumes of data using an Excel-based mass upload tool. There are several Mass Upload tools, some of which require PPS or SPO to perform the upload, while others can be performed by Agencies.

From a Cardinal system standpoint, the Mass Upload process is the same, regardless of the upload. This Job Aid covers the process to complete the following Mass Uploads:

Mass Upload Description	Upload prepared by	Review by DHRM	Upload loaded by
Dept-Posn Funding Mass Upload	Agency	N/A	Agency
Leave Balance Mass Upload	Agency	N/A	Agency
Performance Rating Mass Upload	Agency	N/A	Agency
Reward & Recognition Mass Upload	Agency	N/A	Agency
Additional Pay	Agency	N/A	Agency
Job Data Mass Upload	Agency	DHRM	PPS
New Hire Mass Upload	Agency	DHRM	PPS
Position Mass Upload	Agency	DHRM	PPS
General Deduction Mass Upload	Agency	N/A	SPO

Note: As a reminder positions cannot be deleted in the Cardinal system. Before adding new positions validate that there are not inactive positions that can be re-purposed. DHRM will be checking each position mass upload against the agency's current vacant positions as a validation.

Note: Mass uploads that require DHRM approval (New hires, job data updates, and position data updates) must be uploaded to DHRM's "File Utility Upload" repository by the agency. If you do not have access to this repository, please submit the [DHRM Computer Applications Access Request Form](http://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf) (<http://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf>) to iHelp@dhrm.virginia.gov.

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Agency Mass Uploads Loaded into Cardinal by the Agency

Mass Upload Description	Query Name	Template Name	Navigation to Upload File
Dept-Posn Funding Mass Upload	V_HR_Pos_Funding_Mass_Load	HR373_Department-Position_Funding_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	Cardinal Interfaces > Mass Uploads > Department-Position Funding Mass Upload
Leave Balance Adj Mass Upload	V_TA_Leave_Bal_Adj	TA792_Leave_Balance_Adj_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	Cardinal Interfaces > Mass Uploads > Leave Balance Adj Mass Upload
Performance Rating Mass Upload	V_HR_Performance_Rating	HR371_Performance_Rating_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload
Rewards & Recognition Mass Upload	V_HR_Reward_Recogn_Mass_Data	HR409_Reward and Recognition_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload
Additional Pay	V_Addlpay_Mass	RPY476_Add_Pay_QRY (File is located on the Cardinal Project website under Forms)	Cardinal Interfaces > Mass Uploads > Additional Pay

Run a Query

Each Agency runs a query to obtain current Cardinal data.

The below is an example of how to run the query for Dept_Posn Funding Mass Upload.

1. Navigate to the **Query Viewer Search** page using the following path:

Navigator > Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.

[← Cardinal Homepage](#) Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Query Name begins with

[Search](#) [Advanced Search](#)

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Query Name begins with V_HR_POS_FUNDING_MASS_LOAD

[Search](#) [Advanced Search](#)

- Enter the Query Name in the **Query Name** field.

Note: In this example, the name of the query is **V_HR_POS_FUNDING_MASS_LOAD**.

- Click the **Search** button.

The **Query Viewer Search** page refreshes with the search results displayed at the bottom.

[New Window](#) | [Help](#) | [Person](#)

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By Query Name begins with V_HR_POS_FUNDING_MASS_LOAD

[Search](#) [Advanced Search](#)

Search Results

*Folder View -- All Folders --

Query

1-1 of 1 | [View All](#)

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_HR_POS_FUNDING_MASS_LOAD	Position Funding Query	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

- Click the link of the desired query output format (i.e., HTML, Excel, XML).

The **Position Funding Query** page is displays in a separate window.

V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query

As Of Date

SETID (Leave Blank for All)

DEPTID (Leave Blank for All)

[View Results](#)

Row	Setid	Deptid	Fiscal Year	Bud Lvl	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1	Product	Class Fld	Operating Unit	Chartfield3	Budget Ref	Business Unit PC	Project ID	Activity ID	Resource Type	Resource Cat	Resource Sub Cat	Affiliate	Affiliate Intra1	Program Code
-----	-------	--------	-------------	---------	----------------	------------	--------------	----------	-----------	-------------	-----------	-------------	---------	-----------	----------------	-------------	------------	------------------	------------	-------------	---------------	--------------	------------------	-----------	------------------	--------------

Note: This page displays regardless of the selected output format. The field names may vary based upon the query; this example shows the fields for the **V_HR_POS_FUNDING_MASS_LOAD** query.

5. Enter the As of Date in the **As Of Date** field.
6. Enter the Set ID in the **SETID** field.

Note: Leave the **SETID** field blank if all Business Unit (A Business Unit is a 5 digit code such as 50100 or 15100. The first three digits is the PMIS Agency Code) values are desired. The query only returns the Business Unit (BU) values for which the user has security access.

- Enter the Department ID in the **DEPTID** field.

Note: Leave the **DEPTID** field blank if all Department ID values are desired. The query only returns the Department IDs for which the user has security access.

- Click the **View Results** button.

The **Position Funding Query** page refreshes.

V_HR_POS_FUNDING_MASS_LOAD - Position Funding Query

As Of Date

SETID (Leave Blank for All)

DEPTID (Leave Blank for All)

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

Row	Setid	Deptid	Fiscal Year	Bud Lvl Inc	Effective Date	Eff Status	Position Nbr	Disc_PCT	Fund Code	Chartfield2	Deptid CF	Chartfield1
1	15100	95400	2020	D	07/01/2019	A		100.000	01000	737001	95400	
2	15100	95400	2020	P	07/01/2019	A	DOA00006	100.000	01000	737002	94400	
3	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737001	95400	
4	15100	95400	2020	P	07/01/2019	A	DOA00222	50.000	01000	737004	95200	

Note: The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.

- If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.

Prepare the Upload File

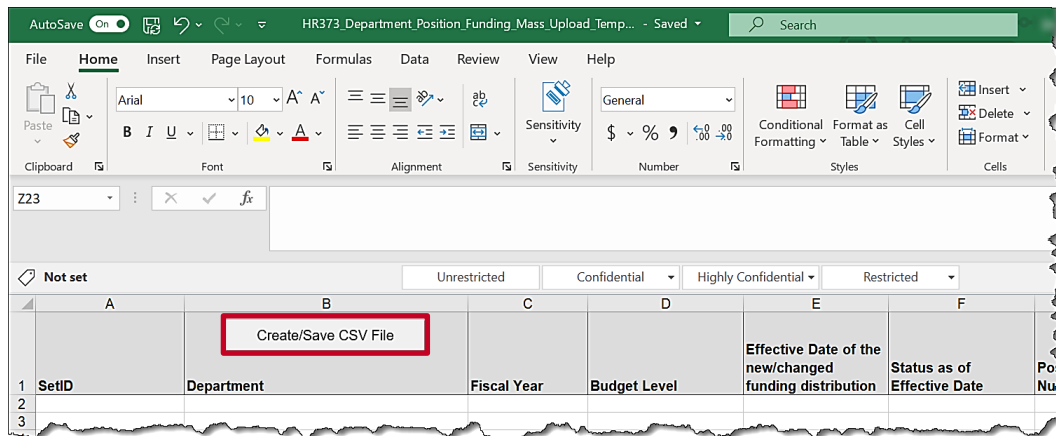
- Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

- Click on Resources
- Click on Forms

Note: Select the appropriate CSV Template file and download the blank template file.

- Locate and open the appropriate **CSV Template** file (for this example the name of the file is **HR373_Department_Position_Funding_Mass_Upload_Template.xlsm**).

The appropriate template opens in Excel.



- When the excel file opens, click on **Enable Content**.
- Enter the required data using the information within the query performed in the **Run a Query** section of this Job Aid.

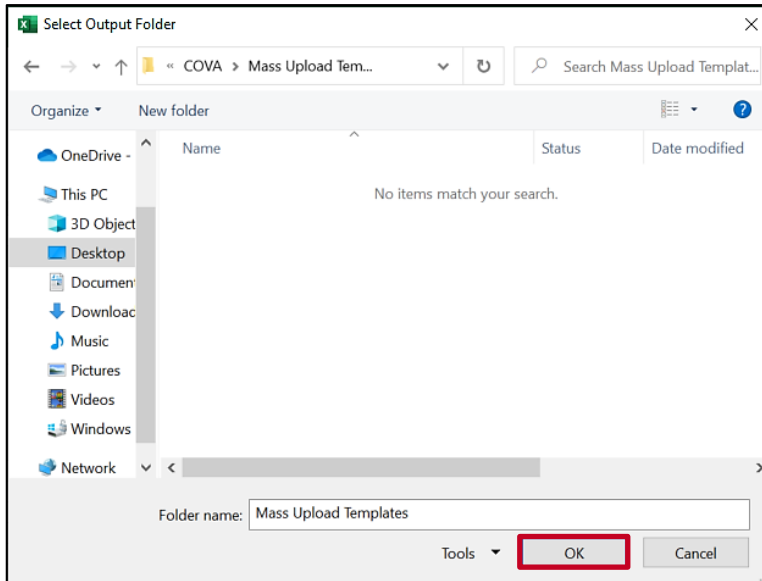
Note: When copying the data from the query and into the applicable excel template, ensure that:

- The columns from the query and the template match and are aligned;
- After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: **Keep Text Only**, **Match Destination Formatting**, or **Values** (any one of these options will function properly) and select it;
- Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report.

- Click the **Create/Save CSV File**.

Note: The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.

The **Select Output Folder** pop-up window displays.



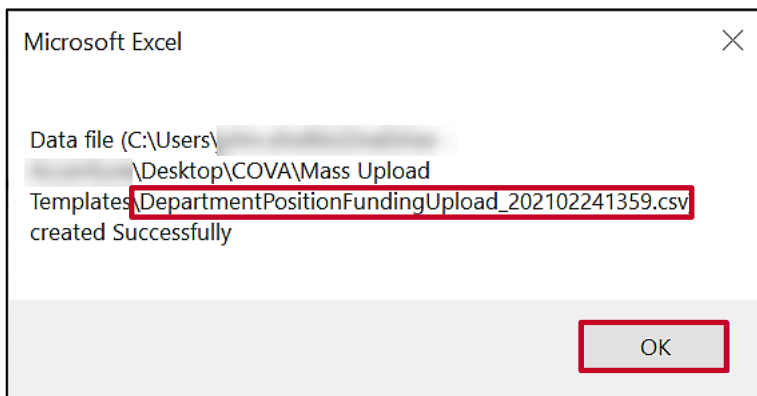
17. Navigate to the desired location.

Note: If the file contains **Personal Information** (i. e. Performance Ratings, Employee ID, Compensation) ensure the file is saved to a local **secure** folder.

18. Click the **OK** button.

Note: The file is automatically named and saved in a CSV format after the **OK** button is clicked. Do not attempt to rename the file.

A message displays.



19. Copy the file name for future use.

20. Click the **OK** button.

Upload a File

21. Navigate to the appropriate **Mass Upload** page using one of the following paths:

Dept-POS Funding Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Dept-POS Funding Mass Upload

Note: This example follows the Dept-Pos Funding Mass Upload.

Leave Balance Adj Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Leave Balance Adj Mass Upload

Performance Rating Mass Upload:

Navigator > Cardinal Interfaces > HR Interfaces > Mass Uploads > Performance Rating Mass Upload

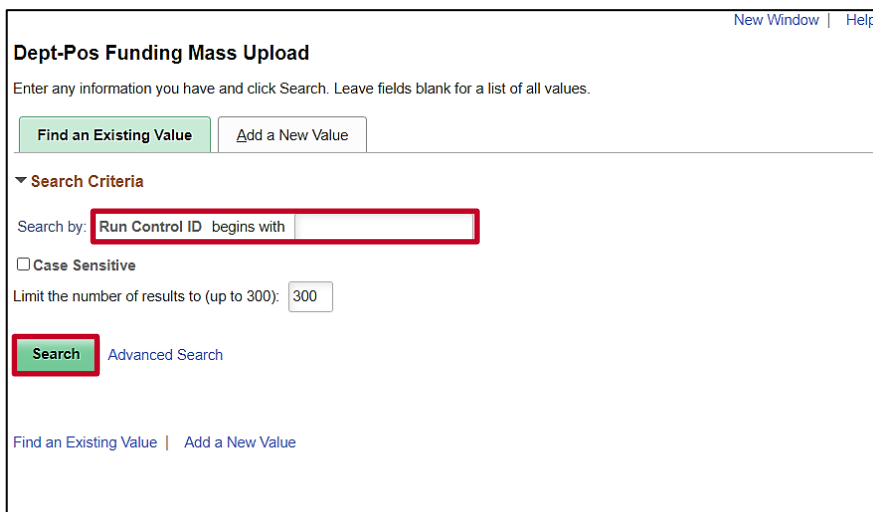
Reward and Recognition Mass Upload:

Navigator > Cardinal Interfaces > HR Interfaces > Mass Uploads > Reward and Recognition Mass Upload

Additional Pay Mass Upload:

Navigator > Cardinal Interfaces > Mass Uploads > Additional Pay

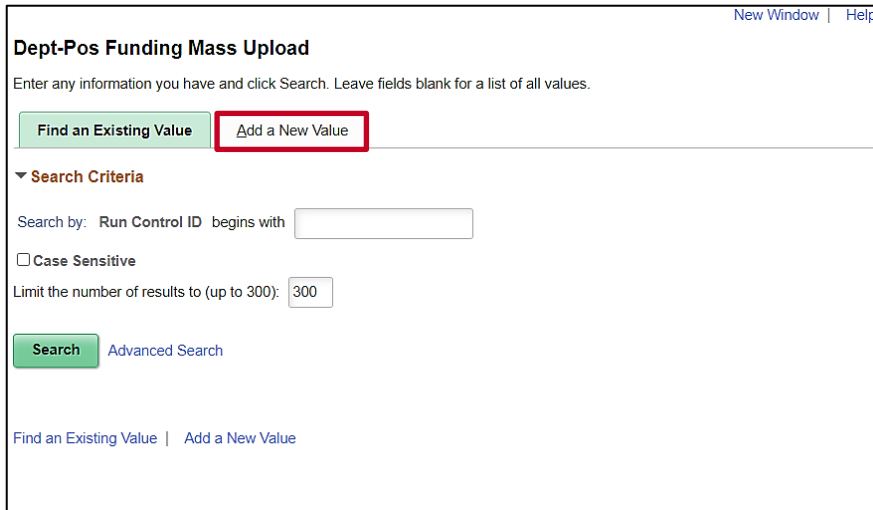
The **Dept-Pos Funding Mass Upload Search** page displays.



22. If an existing Run Control ID is known, proceed to Step 23. If an existing Run Control ID is not known, skip to Step 25.

23. If an existing Run Control ID is known, enter the Run Control ID in the **Run Control ID** field.

24. Click the **Search** button. Skip to Step 28.



Dept-Pos Funding Mass Upload [New Window](#) | [Help](#)

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) **[Add a New Value](#)**

▼ **Search Criteria**

Search by: Run Control ID begins with

☐ Case Sensitive

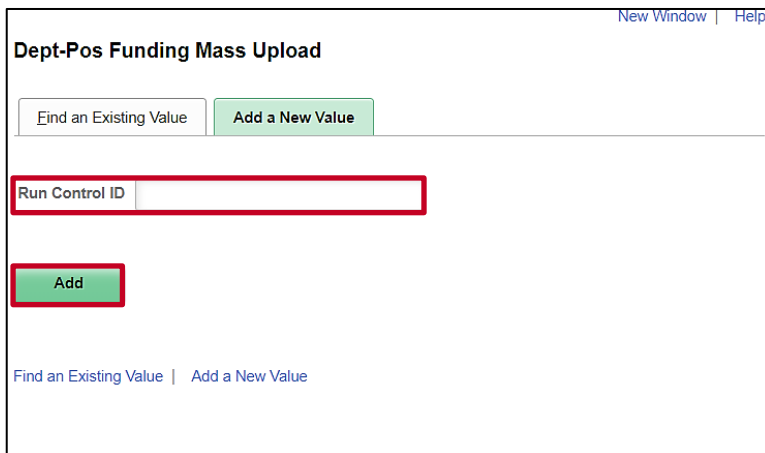
Limit the number of results to (up to 300):

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

25. Click the **Add a New Value** tab.

The **Add a New Value** tab displays.



Dept-Pos Funding Mass Upload [New Window](#) | [Help](#)

[Find an Existing Value](#) **[Add a New Value](#)**

Run Control ID

Add

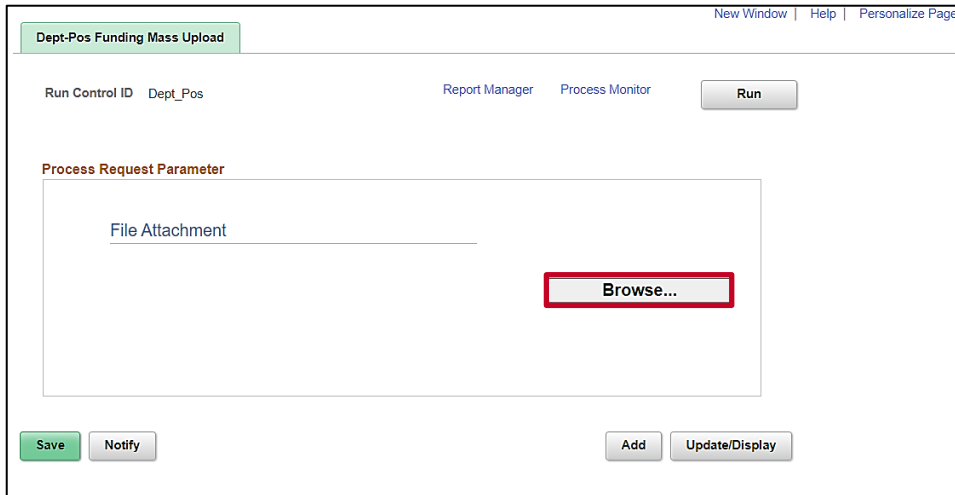
[Find an Existing Value](#) | [Add a New Value](#)

26. Enter the desired Run Control ID in the **Run Control ID** field.

Note: A Run Control ID only needs to be added once and can be reused once added.

27. Click the **Add** button.

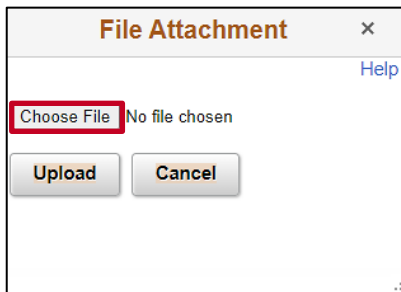
The **Dept-Pos Funding Mass Upload** page displays.



The screenshot shows a web application window titled "Dept-Pos Funding Mass Upload". At the top, there are links for "New Window", "Help", and "Personalize Page". Below the title bar, there is a "Run Control ID" field with the value "Dept_Pos" and buttons for "Report Manager", "Process Monitor", and "Run". The main area is labeled "Process Request Parameter" and contains a "File Attachment" label and a text input field. A red box highlights the "Browse..." button next to the input field. At the bottom, there are buttons for "Save", "Notify", "Add", and "Update/Display".

28. Click the **Browse** button.

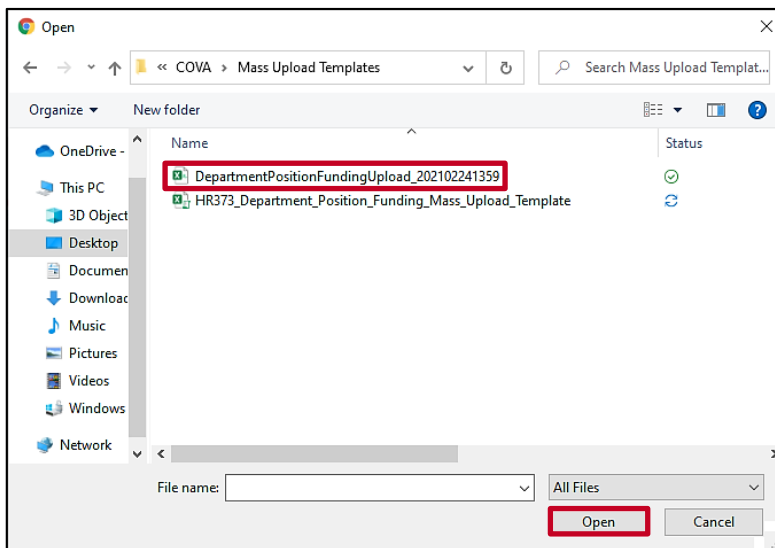
The **File Attachment** page displays in a pop-up window.



The screenshot shows a pop-up window titled "File Attachment" with a close button (X) and a "Help" link. Inside the window, there is a "Choose File" button highlighted with a red box, followed by the text "No file chosen". Below this are "Upload" and "Cancel" buttons.

29. Click the **Choose File** button.

The **Open File** window displays.



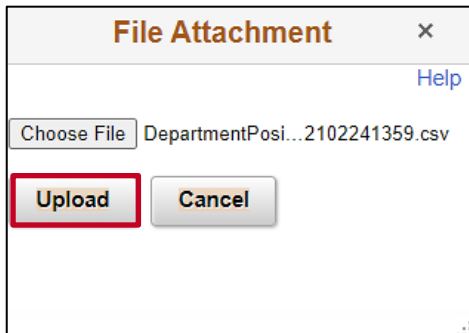
The screenshot shows a Windows "Open" file dialog window. The address bar shows the path "COVA > Mass Upload Templates". The left sidebar shows the "Desktop" folder selected. The main pane displays a list of files with columns for "Name" and "Status". The file "DepartmentPositionFundingUpload_202102241359" is highlighted with a red box. The "Open" button at the bottom right is also highlighted with a red box.

30. Navigate to and select the appropriate Mass Upload file saved during the **Prepare the Upload File** section of this Job Aid.

Note: This example demonstrates the Department Position Funding Mass Upload.

31. Click the **Open** button.

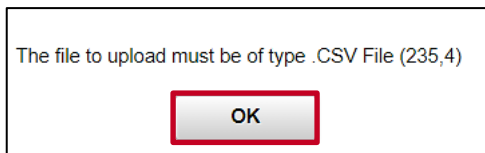
The **File Attachment** page returns.



A dialog box titled "File Attachment" with a close button (X) in the top right corner. Below the title bar is a "Help" link. The main area contains a "Choose File" button followed by the text "DepartmentPosi...2102241359.csv". Below this, there are two buttons: "Upload" (highlighted with a red border) and "Cancel".

32. Click the **Upload** button.
33. If an error message does not display, skip to Step 34.

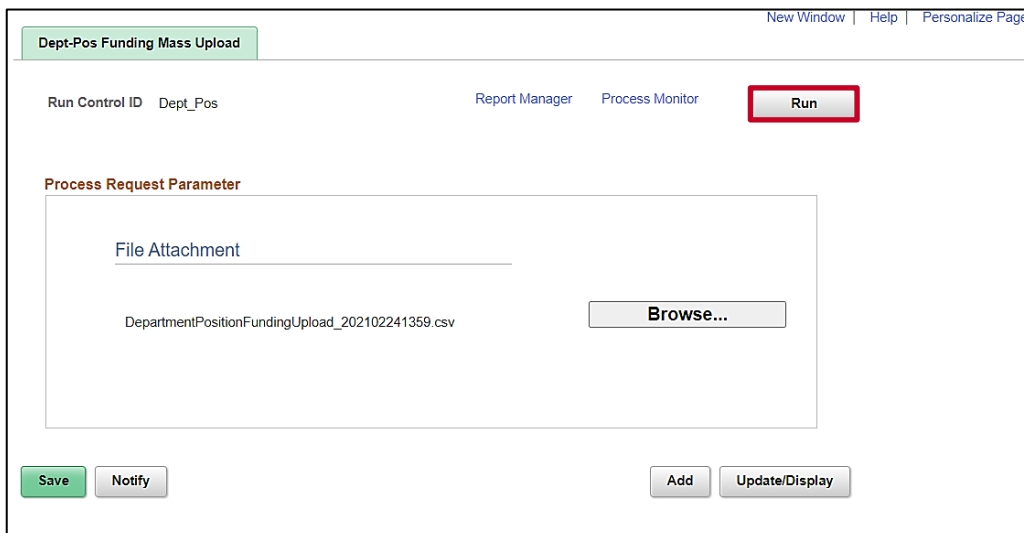
An **Error Message** page displays in a pop-up window if the selected file is not a CSV file.



An error message dialog box with the text "The file to upload must be of type .CSV File (235,4)". Below the text is an "OK" button (highlighted with a red border).

34. Click the **OK** button.
35. Repeat Steps 26 – 30, ensuring to upload the template saved in a CSV format.

The **Dept-Pos Funding Mass Upload** page refreshes.

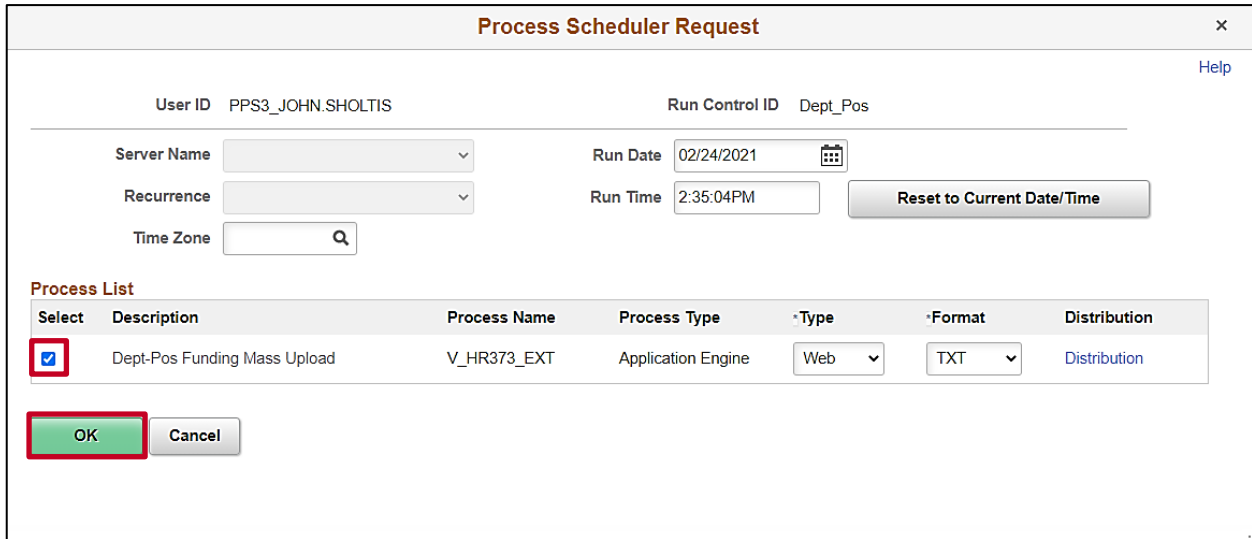


The "Dept-Pos Funding Mass Upload" page. At the top right are links for "New Window", "Help", and "Personalize Page". Below the title bar is a "Run Control ID" field with "Dept_Pos" entered. To the right are links for "Report Manager" and "Process Monitor", and a "Run" button (highlighted with a red border). Below this is a "Process Request Parameter" section. It contains a "File Attachment" label, a text field with "DepartmentPositionFundingUpload_202102241359.csv", and a "Browse..." button. At the bottom are buttons for "Save", "Notify", "Add", and "Update/Display".

36. Click the **Run** button.

Verify the Upload File

The **Process Scheduler Request** page displays in a pop-up window.



Process Scheduler Request

User ID: PPS3_JOHN.SHOLTIS Run Control ID: Dept_Pos:

Server Name: Run Date: 02/24/2021 Run Time: 2:35:04PM [Reset to Current Date/Time](#)

Recurrence: Time Zone:

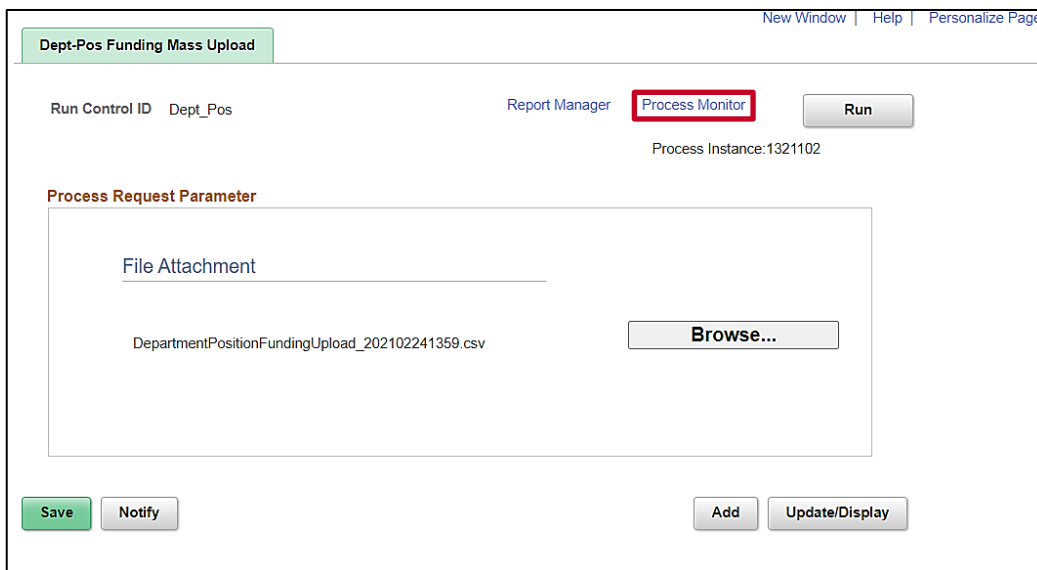
Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Dept-Pos Funding Mass Upload	V_HR373_EXT	Application Engine	Web	TXT	Distribution

37. Verify the **Select** checkbox is selected for the appropriate upload description. (Select the checkbox if it is not already selected).

38. Click the **OK** button.

The **Dept-Pos Funding Mass Upload** page returns.



Dept-Pos Funding Mass Upload [New Window](#) [Help](#) [Personalize Page](#)

Run Control ID: Dept_Pos: [Report Manager](#) [Process Monitor](#)

Process Instance:1321102

Process Request Parameter

File Attachment:

39. Click the **Process Monitor** link.

The **Process Monitor** page displays with the **Process List** tab displayed by default.

Process List | Server List

View Process Request For

User ID Type Last 1 Days **Refresh**

Server Name Instance From Instance To [Report Manager](#)

Run Status Distribution Status ☒ Save On Refresh

Process List

1-1 of 1 | View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1321102		Application Engine	V_HR373_EXT		02/24/2021 2:35:04PM EST	Success	Posted	Details

[Go back to Dept-Pos Funding Mass Upload](#)

Save **Notify**

Process List | Server List

40. Click the Refresh button until the **Run Status** field updates to “**Success**” and the **Distribution Status** field updates to “**Posted**”.

41. Click the **Details** link.

The **Process Detail** page displays in a pop-up window.

Process Detail

Help

Process

Instance 1321102 Type Application Engine
Name V_HR373_EXT Description Dept-Pos Funding Mass Upload
Run Status Success Distribution Status Posted

Run

Run Control ID Dept_Pos
Location Server
Server PSUNX1
Recurrence

Update Process

☐ Hold Request
☐ Queue Request
☐ Cancel Request
☐ Delete Request
☐ Re-send Content ☐ Restart Request

Date/Time

Request Created On 02/24/2021 2:37:34PM EST
Run Anytime After 02/24/2021 2:35:04PM EST
Began Process At 02/24/2021 2:37:56PM EST
Ended Process At 02/24/2021 2:38:08PM EST

Actions

[Parameters](#) [Transfer](#)
[Message Log](#) [View Locks](#)
[Batch Timings](#)
[View Log/Trace](#)

OK **Cancel**

42. Click the **View Log/Trace** link.

The **View Log/Trace** page displays.

View Log/Trace
x

[Help](#)

Report

Report ID 760711
 Name V_HR373_EXT
 Run Status Success

Process Instance 1321102
 Process Type Application Engine

[Message Log](#)

Dept-Pos Funding Mass Upload

Distribution Details

Distribution Node hrpytrn

Expiration Date 03/26/2021

File List

Name	File Size (bytes)	Datetime Created
1321102_DBFILE_READ.LOG	107	02/24/2021 2:38:08.883867PM EST
AE_V_HR373_EXT_1321102.log	218	02/24/2021 2:38:08.883867PM EST
HR373_CI.LOG	230	02/24/2021 2:38:08.883867PM EST

Distribute To

Distribution ID Type

Distribution ID

User

Return

43. Click the link for the file with a “xxxx.log” extension (“AE_V_HR373_EXT_1317850.log” in this example).

The **Error Log** page displays in a new tab. (The screenshots below depict two different error log views).

```

****HR414 New Hire Mass Upload Processing****

Total Number of Rows: 2
Number of Rows Successfully Processed: 1
Number of Rows with Errors: 1
  
```

```

****HR409 Rewards and Recognition Mass Upload Error Log****
Line Number Employee ID Empl_Rcd
2          00012298100 9
2          00012298100 9
3          00021291000 0
3          00021291000 0
3          00021291000 0
11         00900053500 0
11                                     (15,54) - The field {V_REWARD_DATA_CI.V_REWARD_ID(2).V_REWARD_AUTH(1).V_REWARD_PAY(1).AWARD_DATE} is required.
                                           You must enter a value for it before proceeding. (15,54)
11                                     (91,37) - Error saving Component Interface. {V_REWARD_DATA_CI} (91,37)
12         00900158900 0
12         00900158900 0
  
```

Correct Errors

The Agency that ran the file is notified of any errors through the Error Log.

44. Agency Administrators take the necessary actions to correct all identified errors.

Note: The Agency can either correct the errors on Excel and resubmit the upload file or enter the transaction online through an online data entry.

Agency Mass Uploads Reviewed by DHRM and Loaded into Cardinal by PPS

Mass Upload Description	Query Name	Template Name	Navigation to Error Report
Job Data Mass Upload	V_HR_JOB_MASS_DATA_CHAN	HR413_Job_Data_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	
New Hire Mass Upload	There is no query for a New Hire Mass Upload but the user will go straight to step 11 to download the template.	R1 - HR 414A = New_Hire_Mass_Upload with EEID. R2 - HR 414 = New_Hire_Mass_Upload without EEID. (File is located on the Cardinal Project website under Forms)	
Position Mass Upload	V_HR_POSITION_MASS_DATA_CHANGE	HR412_Position_Mass_Upload.xlsm (File is located on the Cardinal Project website under Forms)	

Run a Query

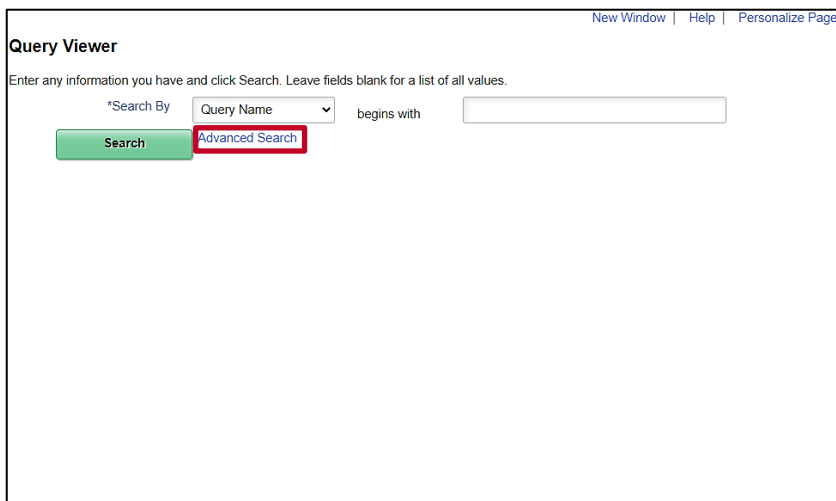
Note: As a reminder positions cannot be deleted in the Cardinal system. Before adding new positions validate that there are not inactive positions that can be repurposed. DHRM will be checking each position mass upload against the agency's current vacant positions as a validation.

If applicable, each Agency runs a query to obtain current Cardinal data. The example below provides the steps to run a Job Data Mass Upload query.

1. Navigate to the **Query Viewer Search** page using the following path:

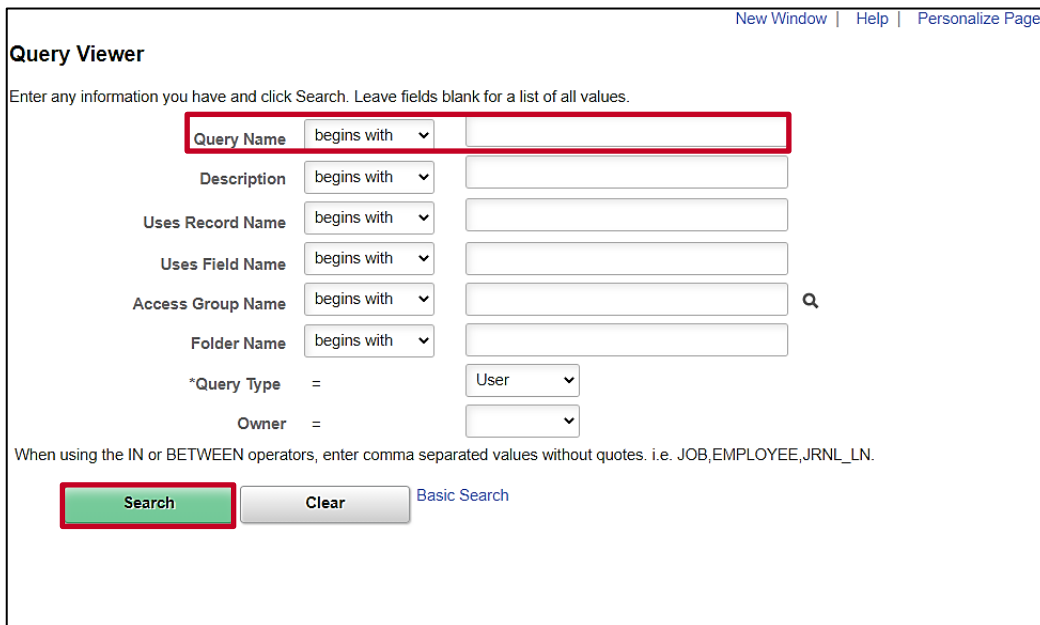
Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.



2. Click the **Advanced Search** link.

The **Query Viewer Search** page refreshes.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name begins with

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with 🔍

Folder Name begins with

*Query Type = User

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

3. Enter the query's name in the **Query Name** field. In this example, the query's name is **"V_HR_JOB_MASS_DATA_CHAN"**.
4. Click the **Search** button.

The **Query Viewer Search** page refreshes with the Search Results displayed at the bottom.

[New Window](#) | [Help](#) | [Personalize Pa](#)

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name	begins with	V_HR_JOB_MASS_DATA_CHAN
Description	begins with	
Uses Record Name	begins with	
Uses Field Name	begins with	
Access Group Name	begins with	
Folder Name	begins with	
*Query Type	=	User
Owner	=	

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Search](#) [Clear](#) [Basic Search](#)

Search Results

*Folder View [-- All Folders --](#)

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML
V_HR_JOB_MASS_DATA_CHANGE	Job Mass Update query	Public		HTML	Excel	XML

- Click the link of the desired query output format (i.e., HTML, Excel, XML).

The **Job Mass Update Query** page is displays in a separate window.

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date [\[?\]](#)

Unit [\[?\]](#)

Dept ID [\[?\]](#)

[View Results](#)

Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstabID	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq	Non State Comp Rate
-----	---------------	--------	----------	----------------	--------	---------------	--------------	---------	----------------	----------	---------------	--------------	-------------	-------------	-----------------	--------------	---------------------

Note: This page displays regardless of the selected output format. The field names may vary based upon the query; this example shows the fields for the **V_HR_JOB_MASS_DATA_CHAN** query

- Enter the As of Date in the **As Of Date** field.
- Enter/select the Business Unit using the **Unit** field look-up icon. (A Business Unit is a 5 digit code such as 50100 or 15100. The first three digits is the PMIS Agency Code).

8. Enter/select the Department ID using the **Dept ID** field look-up icon.
9. Click the **View Results** button.

The **Job Mass Update Query** page refreshes.

V_HR_JOB_MASS_DATA_CHANGE - Job Mass Update query

As of Date: 11/09/2019 [dt]

Unit: 10000 [Q]

Dept ID: [Q]

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (222 kb)

[View All](#)

Row	Business Unit	EmplId	Empl Rcd	Effective Date	Action	Action Reason	Position Nbr	EstabID	Employee Class	Paygroup	Employee Type	Tax Location	FICA Status	Job Std Hrs	State Comp Rate	ST Comp Freq	Non State Comp Rate	Non ST Comp Freq	State Ben Comp Rate	State Ben Comp Freq	Hourly Comp Rate
1	10000		0	01/04/2017	HIR	CNV	SOVAA100	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
2	10000		0	10/31/2019	DTA	CNV	SOV90000	SOV	OTO	MTH	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
3	10000		0	11/01/1997	HIR	CNV	SOVCLK24	SOV	ONC	MNP	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000
4	10000		0	07/01/1976	HIR	CNV	SOVWG117	SOV	GNW	BW1	H	760	N	40.00	0.000000		0.000000		0.000000		24.038462
5	10000		0	11/09/2019	DTA	CNV	SOVCLK29	SOV	ONC	SM1	S	760	N	40.00	50000.000000	A	0.000000		0.000000		0.000000

Note: The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.

10. If desired, click the corresponding link to download a file version (i.e., Excel, CSV, XML) of the query.

Prepare the Upload File

11. Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

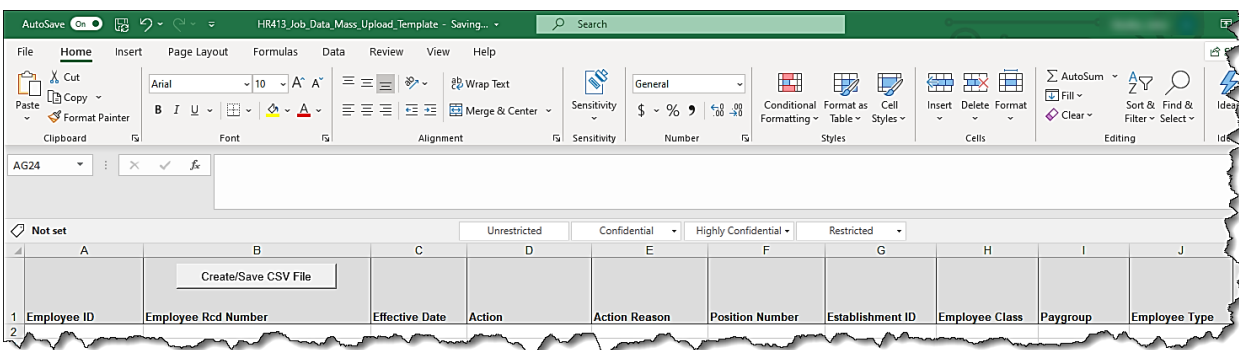
12. Click on Resources

13. Click on Forms

Note: Select the appropriate CSV Template file and download the blank template file.

14. Locate and open the **CSV Template** file

The appropriate template displays in Excel.



15. When the excel file opens, click on **Enable Content**.

16. Enter the required data using the information within the query performed in the **Run a Query** section of this Job Aid.

Note: When copying the data from the query and into the applicable excel template, ensure that:

1. The columns from the query and the template match and are aligned;
2. After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: **Keep Text Only**, **Match Destination Formatting**, or **Values** (any one of these options will function properly) and select it;
3. Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report.

Note: When you save the file, the extension of the file for Position Upload, Job Data Upload or New Hire Upload MUST be XLSM. For this example the name of the file is **HR414_Job_Data_Mass_Upload_Template.xlsm**.

17. Save as an EXCEL file to the secure File Utility Upload folder as noted below. DON'T click the CSV file button.

Note: Mass uploads that require DHRM approval (New hires, job data updates, and position data updates) must be uploaded to DHRM's "File Utility Upload" repository by the agency. If you do not have access to this repository, please submit the [DHRM Computer Applications Access Request](#)

Form (<http://web1.dhrm.virginia.gov/itech/forms/DHRMUserAccessRegistrationform.pdf>) to iHelp@dhrm.virginia.gov.

18. Send an email to iHelp@dhrm.virginia.gov providing notification that there is a file in the secure file repository for review and approval.

Note: After the mass upload has been reviewed by DHRM, DHRM will place the file in a secure folder on the Change Network (CN) SharePoint site. DHRM will create a VCCC ticket for PPS to process the mass upload.

Correct Errors

After PPS runs the file, they will provide the error log to the Agency with a copy to DHRM.

Agency Administrators take the necessary actions to correct all identified errors. In the event of errors, only the line(s) containing an error(s) will error out.

Note: The Agency can either correct the errors on Excel and resubmit the upload file or enter the transaction through an online data entry.

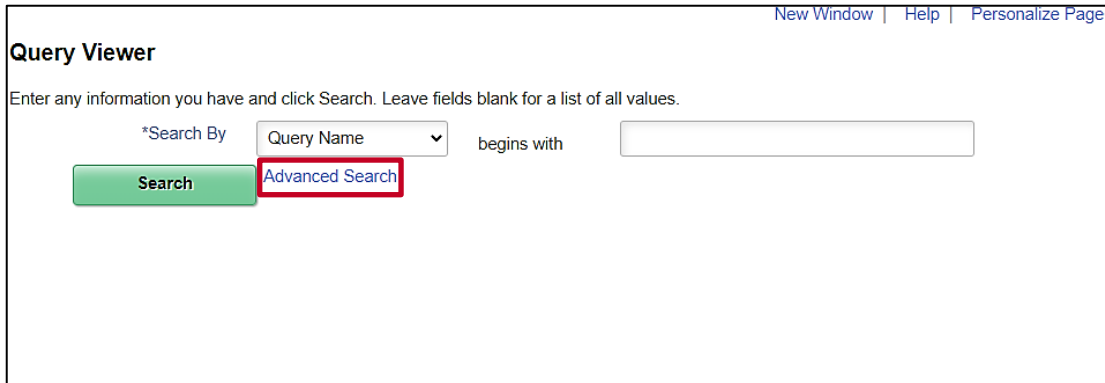
Agency Mass Uploads Loaded into Cardinal by SPO

General Deduction Mass Upload – Run a Query

1. Navigate to the **Query Viewer Search** page using the following path:

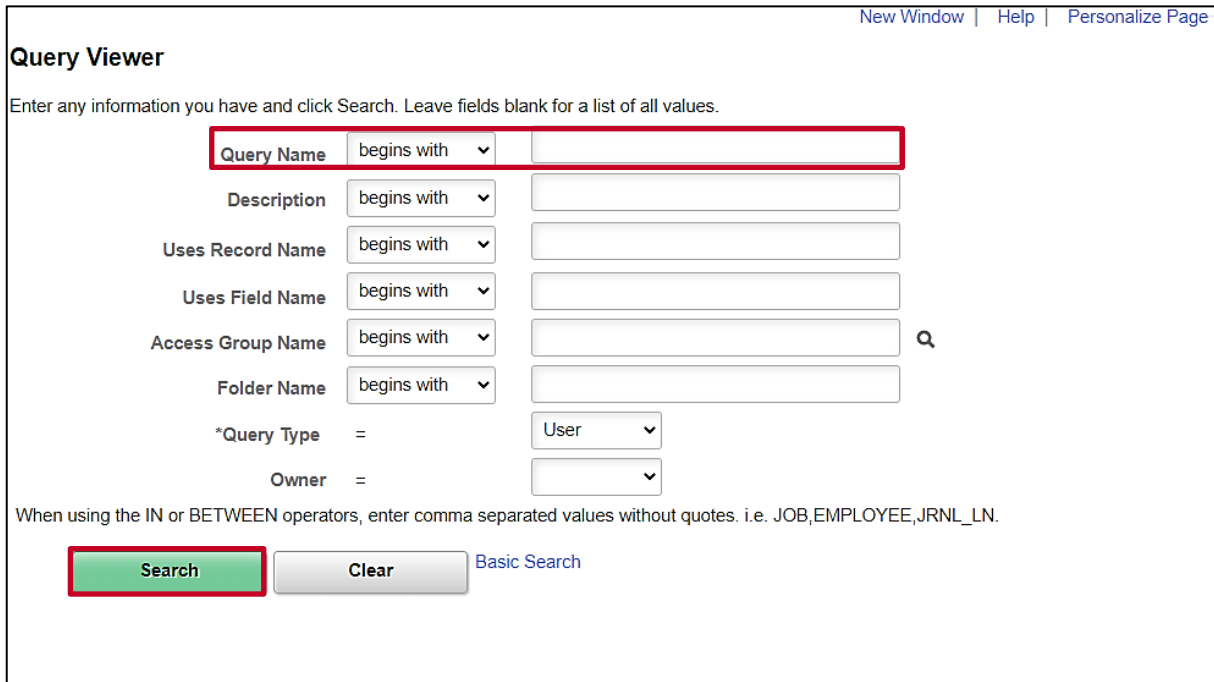
Navigator > Reporting Tools > Query > Query Viewer

The **Query Viewer Search** page displays.



2. Click the **Advanced Search** link.

The **Query Viewer Search** page refreshes.



3. Enter the Query Name in the **Query Name** field.

Note: In this example the name of the query is **V_GENL_DEDUCTION_MASS**.

4. Click the **Search** button.

The **Query Viewer Search** page refreshes with the search results displayed at the bottom.

Query Viewer New Window | Help | Personalize P

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name begins with V_GENL_DEDUCTION_MASS

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

Folder Name begins with

*Query Type = User

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Search](#) [Clear](#) [Basic Search](#)

Search Results

*Folder View -- All Folders --

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Sch
V_GENL_DEDUCTION_MASS	General Deduction Query	Public		HTML	Excel	XML	Sch

- Click the link of the desired query output format (i.e., HTML, Excel, XML).

The **General Deduction Query** page is displays in a separate window.

V_GENL_DEDUCTION_MASS - General Deduction Query

Company [Q](#)

General Deduction Code [Q](#)

As of Date [\[C\]](#)

[View Results](#)

Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
-----	-------------	---------	------------------------	----------------	-----------------	------------------	------------------------	--------------------	-----------------------	------------------------

- Enter/select the appropriate Company using the **Company** field look-up icon.
- Note:** Leave the **Company** field blank to view all Company values. The query only returns the Company values for which the user has security access.
- Enter/select the appropriate General Deduction code using the **General Deduction Code** field look-up icon.
- Enter/select the appropriate As of Date using the **As of Date Calendar** icon.

9. Click the **View Results** button.

The **General Deduction Query** page refreshes.

V_GENL_DEDUCTION_MASS - General Deduction Query

Company

General Deduction Code

As of Date

View Results

Download results in : Excel Spreadsheet CSV Text File XML File (1 kb)

View All First 1-5 of 5 Last

Row	Employee ID	Company	General Deduction Code	Effective Date	Ded Calc Method	Deduction Amount	Deduction Rate/Percent	Deduction End Date	Deduction Goal Amount	Deduction Goal Balance
1		ABC	OPTLIF	09/01/2019	Flat Amount	16.23	0.000		0.00	0.00
2		ABC	OPTLIF	01/01/2016	Flat Amount	12.08	0.000		0.00	0.00
3		ABC	OPTLIF	11/01/2019	Flat Amount	6.27	0.000		0.00	0.00
4		ABC	OPTLIF	10/25/2019	Flat Amount	8.00	0.000	12/31/2019	0.00	0.00
5		ABC	OPTLIF	10/25/2019	Flat Amount	8.00	0.000		0.00	0.00

Note: The above screenshot displays if the **HTML Query Output Format** link is selected. A download initiates if the **Excel** or **XML Query Output Format** link is selected. After the file is downloaded, select the file to open and view the query results. The information within the output is used to prepare the Mass Upload file.

Prepare the Upload File

- Click on the following link to navigate to the Cardinal Project Website.
<https://www.cardinalproject.virginia.gov/>

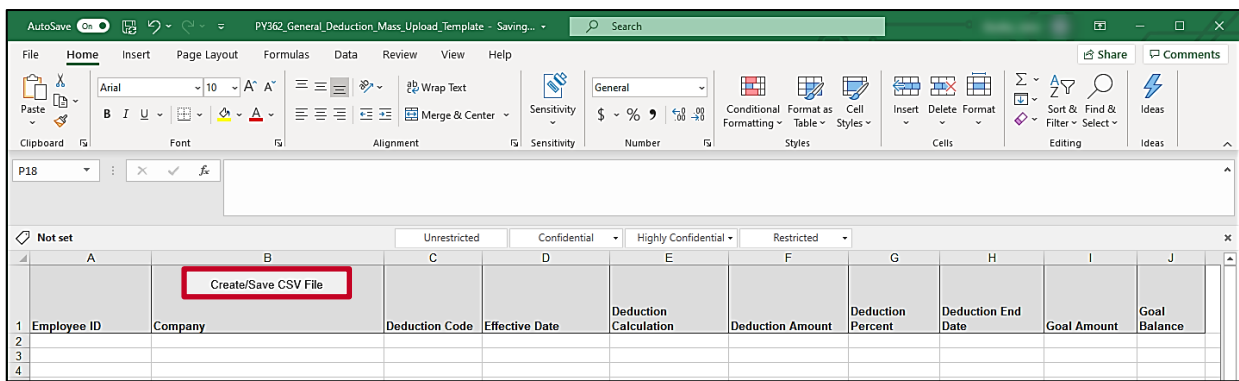
- Click on Resources

- Click on Forms

Note: Select the appropriate CSV Template file and download the blank template file.

- Locate and open the appropriate **CSV Template** file

The appropriate template displays in Excel.



- When the excel file opens, click on **Enable Content**.
- Enter the required data using the information within the query performed in the **Run a Query** section of this Job Aid.

Note: When copying the data from the query and into the applicable excel template, ensure that:

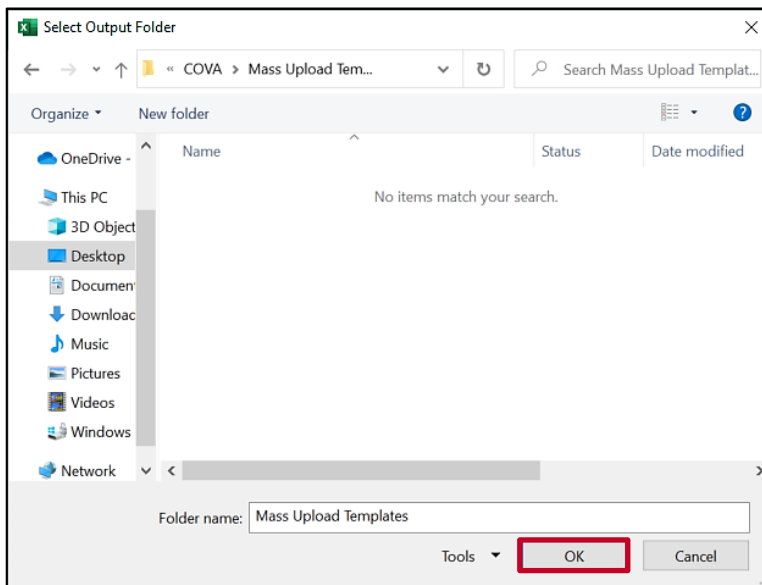
- The columns from the query and the template match and are aligned;
- After copying the data, when pasting into the template, right click cell 2A and hover over the options under Paste Options until you find one of the following: **Keep Text Only**, **Match Destination Formatting**, or **Values** (any one of these options will function properly) and select it;
- Ensure that only the rows that are being changed are copied over into the applicable excel template from the query. Providing data that contains no changes will result in the data failing to load into Cardinal. This will impact the error report.

- Click the **Create/Save CSV File**.

Note: The naming of the file can't be altered before uploading it to Cardinal and it will overwrite the previous upload document.

- Load the saved CSV file to SPO Sharepoint in the General Deduction Mass Upload Requests folder. Once the file has been loaded the appropriate SPO staff will be automatically alerted that a file exists..

The **Select Output Folder** pop-up window displays.

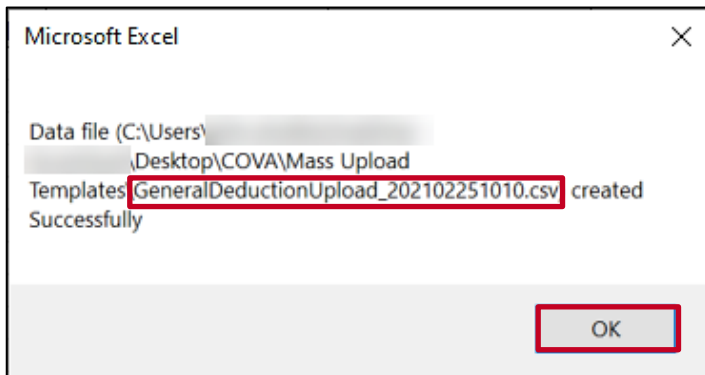


18. Navigate to the desired secure location.

19. Click the **OK** button.

Note: The file is automatically named and saved in a CSV format after the **OK** button is clicked. Do not attempt to rename the file.

A message displays.



20. Copy the file name for future use.

21. Click the **OK** button.

22. SPO uploads the file.

Correct Errors

23. SPO will take the necessary actions to correct all identified errors. In the event of errors, the entire file does not error out, only the lines containing an error(s).

Note: SPO will either correct the errors on Excel and resubmit the upload file or enter the transaction through an online data entry.

Note: Processing rules for each of the mass upload required fields are available in the applicable templates on the Cardinal website.